

# Participant User Manual Appointment System



TABLE OF CONTENTS

TABLE OF CONTENTS ..... 2

**System Overview ..... 3**

**Menu Options ..... 3**

**Application Access ..... 3**

**Patient Registration ..... 4**

**Schedule Appointment ..... 5**

**Manage Appointment..... 9**

**Cancel Appointment ..... 11**

**Profile Update ..... 12**

**Feedback ..... 16**

## System Overview

The Appointment System enables the User to perform the following functions:

- New Patient Registration
- Retrieve User Name
- Retrieve Password
- Schedule Appointment
- Manage Appointment
- Cancel Appointment
- Profile Update
- Feedback

## Menu Options

- Schedule Appointment
- Manage Appointment
- Profile Update
- Feedback

## Application Access

1. Open the browser and enter the URL:

**URL to Application in separate email**

2. Press **Enter** or click **Go**

3. The login page of the application appears as in [Figure 1.1 Login Screen](#)

The screenshot shows a web browser window with a light blue background. At the top, it says "Welcome to the automated appointment system". Below that, it asks the user to "Please select your option." with two radio button choices: "I am a new User (Sign-up to see results online through secure portal)" and "I am a returning User (I am registered and/or have an appointment)". At the bottom, there is a section for "Summit Health's Vision Statement" and "Summit Health's Mission Statement", followed by a link to "Click Here to go to the Summit Health Web site". The footer contains links for "About Summit Health", "Contact Summit Health", and "Privacy", along with a disclaimer: "This system is restricted to only authorized users and Summit Health approved business" and the copyright notice "© 2010 Summit Health".

[Figure 1.1: Login Screen](#)

## Patient Registration

1. Click **I am a new User** radio button on the login screen.
2. This will open the **Patient Registration - Contact Information** as shown in [Figure 2.1](#)

Patient Registration - Contact Information

Please provide the following information and click Register to continue  
Fields marked with \* are mandatory  
Note : Creation of Username and Password will assist you in scheduling appointment, managing your appointment and to view your results online.

Company Name  User Name \*  [Check Availability](#)

First Name \*  Password \*

MI  Confirm Password \*

Last Name \*  ☐ Do you want to register your spouse?

Gender

Email Address

Confirm Email Address

Phone  Ext

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Figure 2.1 Patient Registration

3. Fill in the details in the fields marked with asterisk.
4. For the Email Address and Confirm Email Address, you can't copy and paste the content. **IMPORTANT: You must enter a valid email address in order to receive confirmation and reminder emails.**
5. If you wish to register for your spouse, then you need to click on **Do you want to register your spouse** check box as shown in [Figure 2.2](#). Note: this feature may not be available to you.

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Patient Registration - Contact Information

Please provide the following information and click Register to continue  
Fields marked with \* are mandatory  
Note : Creation of Username and Password will assist you in scheduling appointment, managing your appointment and to view your results online.

Company Name  Sex \*

First Name \*  SSN

MI  Employee ID

Last Name \*  Member ID

Date Of Birth  Phone

Email Address  User Name \*  [Check Availability](#)

Confirm Email Address  Password \*

Confirm Password \*

Do you want to register your spouse? ☒

Do you want to view your results online ? ☐

**Spouse Information**

First Name \*  Sex \*

MI  SSN

Last Name \*  Employee ID

Date Of Birth  Member ID

Email Address  Phone

Figure 2.2 Spouse Registration

- Click on **Register** button to get registered. This will take you to **Manage Credential Screen** where you will give the Security Question and Answer as seen in Figure 2.3

Figure 2.3 Manage Credentials

- Select the Security Question and answer and click on Update Security Question Information. This will take you to Schedule Appointment Page.

## Schedule Appointment

- After successful login you will get the Schedule Appointment page as shown in Figure 3.1

Figure 3.1 Schedule Appointment

2. The values for Client Name and Program will be grey out and fixed.
3. Select the value for State from **State** dropdown menu.
4. The corresponding value for City and Site will be populated. Select the value of City from **City** dropdown and for Site from **Site** dropdown menu as shown in [Figure 3.2](#)
5. Here **Click to Manage Appointment** button will be disabled as there is no appointment in the name of this user to manage or reschedule.
6. After selecting the **Site** the values for the **Clinics** available will be populated.

Appointment >> Schedule Appointment

Fields marked with \* are mandatory  
Below are the steps to Schedule a Clinic

**Step 1 - Select Site**  
 a. Please Select the State.  
 b. Please Select the City.  
 c. Please Select the Site.

**Step 2 - Select Clinic**  
 a. Select the Clinic (Multiple Clinics may be available at each site.)

**Step 3 - Select the action you want to perform**  
 a. To Schedule Appointment - Click on "Schedule Appointment" button.  
 b. View/Change Appointment - Click on "Manage Appointment" button.  
 c. View MAP of Site - Click on "Show Site Map" button.

**Select Site**

Client Name\* Rajesh CLIENT  
 Program\* Immunizations  
 State\* Michigan  
 City\* Southfield  
 Site\* Rajesh CLIENT-3162 Ground Floor Southfield, MI-48034

**Select the Clinic**

**Clinics Available**

☒ 07/07/2010 9:00AM To 12:00PM  
☐ 07/17/2010 7:00AM To 9:00AM  
☐ 06/30/2010 10:00AM To 12:00PM  
☐ 07/30/2010 10:00AM To 12:00PM

**Action**

[CLICK TO SCHEDULE APPOINTMENT](#) [CLICK TO MANAGE APPOINTMENT](#) [CLICK TO SHOW SITE MAP](#)

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Figure 3.2 Lists of Clinics

7. The list of **Clinics** associated with that particular Site will be populated with the radio button as shown in [Figure 3.2](#). This shows the list of clinics which are going to take place in the future. This does not show the expired clinics.
8. Select the value of Clinic by clicking on the radio button against the clinic.
9. Click on **Click To Schedule Appointment** button. This will open the Clinic Layout with the Appointments Available and color Legends to indicate **Available**, **Unavailable**, **Waitlist** and **Your Schedule Slot** as shown is [Figure 3.3](#)

Fields marked with \* are mandatory  
Below are the steps to Schedule a Clinic

**Step 1 - Select Site**  
a. Please Select the State.  
b. Please Select the City.  
c. Please Select the Site.

**Step 2 - Select Clinic**  
a. Select the Clinic (Multiple Clinics may be available at each site.)

**Step 3 - Select the action you want to perform**  
a. To Schedule Appointment - Click on "Schedule Appointment" button.  
b. View/Change Appointment - Click on "Manage Appointment" button.  
c. View MAP of Site - Click on "Show Site Map" button.

**Select Site**  
Client Name\*  State\*   
Program\*  City\*   
Site\*

**Select the Clinic**  
Clinics Available:  
☐ 07/07/2010 9:00AM To 12:00PM ☐ 07/17/2010 7:00AM To 9:00AM ☒ 06/30/2010 10:00AM To 12:00PM  
☐ 07/30/2010 10:00AM To 12:00PM

**Appointment**  
Schedule Appointment Slot For: ☒ Self

[CLICK TO SCHEDULE APPOINTMENT](#) [CLICK TO MANAGE APPOINTMENT](#) [CLICK TO SHOW SITE MAP](#)

To schedule an appointment click on the white area next to Appointment

Legend: ☐ Available ☐ Unavailable ☐ WaitList ☒ Your Scheduled Slot

Appointment Start Time :06/30/10 10:00 AM Appointment End Time :06/30/10 12:00 PM

Appointment Time Slot	Appointments	
0:00 AM To 10:30 AM	2/3 Appointments Available	Click here to schedule a time slot
0:30 AM To 11:00 AM	3/3 Appointments Available	Click here to schedule a time slot
1:00 AM To 11:30 AM	3/3 Appointments Available	Click here to schedule a time slot
1:30 AM To 12:00 PM	2/3 Appointments Available	Click here to schedule a time slot

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Figure 3.3 Appointments Available

10. Click on the space with text as "Click here to schedule a time slot" on the time slot as desired to schedule the appointment.
11. This will lead to Appointment Confirmation page [Figure 3.4](#)

Appointment >> Appointment Confirmation

Company Name  Employee Name   
Site  Phone   
Program Title  Email   
Clinic Type  Event Date   
Appointment Start Time

**Consent Forms**  
[View Consent Forms](#)

**How will you come for this appointment (Fasting Status) ?**  
☐ Fasting  
☐ Non Fasting  
☐ Don't know

**Outlook Calendar**  
☐ Enable Microsoft Outlook meeting notice with Confirmation Mail

**Special Requirement Question:**  
☐ Are you confined to a wheelchair? ☐ Are you hearing impaired?  
☐ Are you visually impaired?  
☐ Does your height exceed 81 inches (6 feet 9 inches)?

[CONFIRM APPOINTMENT](#) [PRINT](#) [EXIT](#) [CANCEL APPOINTMENT](#)

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Figure 3.4 Appointment Confirmation

12. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button. (Note: there may not be any questions to answer depending on the program)
13. This will confirm your appointment on the desired slot and show the message as **“Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: 07/30/2010, Appointment Start Time: 10:00 AM, Appointment End Time: 10:30 AM”** as shown in [Figure 3.5](#). Here you will receive the email from Admin regarding your appointment confirmation.

The screenshot displays the 'Appointment Confirmation' page. At the top, there is a navigation bar with 'Appointment', 'My Profile', and 'Feedback' tabs. Below the navigation bar, the page title is 'Appointment >> Appointment Confirmation'. The main content area contains several form fields for appointment details:

- Company Name:** Rajesh CLIENT
- Employee Name:** Ritwik Kumar
- Site:** L010511-3162 Ground Floor, S
- Phone:** (empty field)
- Program Title:** Immunization
- Email:** rajesh.s@technosoftcorp.com
- Clinic Type:** Flu shot
- Event Date:** 06/30/2010
- Appointment Start Time:** 10:00 AM

Below the form fields, there is a section for 'Consent Forms' with a link to 'View Consent Forms'. A red heading asks 'How will you come for this appointment (Fasting Status) ?' with three radio button options: 'Fasting' (selected), 'Non Fasting', and 'Don't know'. A blue box contains instructions: 'Do not eat anything except water for atleast 9 hours before having your screening test. You are allowed to take your medicines with water the morning of the test.'

Next is the 'Outlook Calendar' section with a checkbox 'Enable Microsoft Outlook meeting notice with Confirmation Mail' which is checked. Below this is the 'Special Requirement Question:' section with four checkboxes: 'Are you confined to a wheelchair?' (checked), 'Are you hearing impaired?' (unchecked), 'Are you visually impaired?' (unchecked), and 'Does your height exceed 81 inches (6 feet 9 inches)?' (unchecked).

At the bottom, a green message states: 'Your appointment has been booked. A confirmation email has been sent to your email address. Your Appointment Date : 06/30/2010 , Appointment Start Time : 10:00 AM , Appointment End Time : 10:30 AM'. Below this message are four buttons: 'CONFIRM APPOINTMENT', 'PRINT', 'EXIT', and 'CANCEL APPOINTMENT'.

Figure 3.5 Appointment Confirmation and mail sent

14. When you click on **Cancel Appointment** button, this will take you back to the Schedule Appointment page.
15. When you hit on **Print** button, this will print the screen of the appointment scheduled.
16. Click on **Exit** button, this will make you logout of the application.



## Manage Appointment

1. Select the **Manage Appointment** tab under **Appointment** menu as shown in [Figure 4.1](#)

Appointment ▾ My Profile Feedback

Schedule Appointment Appointment

Manage Appointment **Manage Appointment** e mandatory

Below are the steps to Schedule a Clinic

**Step 1 - Select Site**

- a. Please Select the State.
- b. Please Select the City.
- c. Please Select the Site.

**Step 2 - Select Clinic**

- a. Select the Clinic (Multiple Clinics may be available at each site.)

**Step 3 - Select the action you want to perform**

- a. To Schedule Appointment - Click on "Schedule Appointment" button.
- b. View/Change Appointment - Click on "Manage Appointment" button.
- c. View MAP of Site - Click on "Show Site Map" button.

**Select Site**

Client Name\* Rajesh CLIENT State\* Michigan ▾

Program\* Immunizations City\* Southfield ▾

Site\*

**Select the Clinic**

Action

CLICK TO SCHEDULE APPOINTMENT CLICK TO MANAGE APPOINTMENT CLICK TO SHOW SITE MAP

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Figure 4.1 Manage Appointment

2. Screen as in [Figure 4.2](#) appears displaying the current appointment

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Appointment ▾ My Profile Feedback

Appointment >> Manage Appointment rajeshs

Client Name Rajesh Inc.

Program Type Immunization

Program Type	Program	State	City	Site	First Name	Last Name	Slot Type	Confirmed Appointment Time	Wait List Appointment Time
Immunization	Rajesh Inc. Immunization 03/19/2010 - 05/31/2010	Kentucky	Moorefield	Site for Rajesh Inc.	rajesh	sinha	Self	4/24/2010 9:00:00 AM CANCEL / RESCHEDULE	

\* To cancel your appointment, please click 'Cancel'

\* To reschedule your existing appointment, please click 'Reschedule'

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Figure 4.2 On selecting Manage Appointment

3. Click on Reschedule button. This is show an alert message **"Do you want to Reschedule this appointment?"** as shown in [Figure 4.3](#)

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Appointment >> Manage Appointment rajeshs

Client Name: Rajesh Inc.

Program Type: Immunization

Program Type	Program	State	City	Site	First Name	Last Name	Slot Type	Confirmed Appointment Time	WaitList Appointment Time
Immunization	Rajesh Inc. Immunization 03/19/2010 - 05/31/2010	Kentucky	Moorefield	Site for Rajesh Inc.	rajesh	sinha	Self	4/24/2010 9:00:00 AM CANCEL / RESCHEDULE	

\* To cancel your appointment, please click 'Cancel'  
\* To reschedule your existing appointment, please click 'Reschedule'

Windows Internet Explorer  
Do you want to Reschedule this appointment?  
OK Cancel

Figure 4.3 Alert Message

- Click on **Cancel** button to remain on the same page.
- Click on **OK** button, this will open the Reschedule Appointment page as shown in Figure 4.4. Here the user can **Reschedule** his/her appointment time for the same clinic based on the availability of the slots. The **green strip** shows user's already **Scheduled slot**. This also shows the number of appointments available out of total number of Appointment Available in a particular time slot.

Appointment >> Reschedule Appointment

Fields marked with \* are mandatory  
Below are the steps to Schedule a Clinic

Step 1 - Select Site  
a. Please Select the State.  
b. Please Select the City.  
c. Please Select the Site.

Step 2 - Select Clinic  
a. Select the Clinic (Multiple Clinics may be available at each site.)

Step 3 - Select the action you want to perform  
a. To Schedule Appointment - Click on "Schedule Appointment" button.  
b. View/Change Appointment - Click on "Manage Appointment" button.  
c. View MAP of Site - Click on "Show Site Map" button.

Select Site  
Client Name: Rajesh CLIENT  
State: Michigan  
Program: Immunizations  
City: Southfield  
Site: Rajesh CLIENT-3162 Ground Floor Southfield, MI-48034

Select the Clinic  
Clinics Available  
☐ 07/07/2010 9:00AM To 12:00PM  
☐ 07/17/2010 7:00AM To 9:00AM  
☒ 06/30/2010 10:00AM To 12:00PM  
☐ 07/30/2010 10:00AM To 12:00PM

Action  
Schedule Appointment Slot For: Self  
CLICK TO SCHEDULE APPOINTMENT CLICK TO MANAGE APPOINTMENT CLICK TO SHOW SITE MAP  
To schedule an appointment click on the white area next to Appointment

Legend: ☐ Available ☐ Unavailable ☐ WaitList ☒ Your Scheduled Slot

Appointment Start Time :06/30/10 10:00 AM Appointment End Time :06/30/10 12:00 PM

Appointment Time Slot	Appointments	
10:00 AM To 10:30 AM	1/3 Appointments Available	Ritwik Kumar (C)
10:30 AM To 11:00 AM	3/3 Appointments Available	Click here to schedule a time slot
11:00 AM To 11:30 AM	3/3 Appointments Available	Click here to schedule a time slot
11:30 AM To 12:00 PM	2/3 Appointments Available	Click here to schedule a time slot

Figure 4.4 Reschedule Appointment

- Click on the space with text as "Click here to schedule a time slot" on the time slot as desired to schedule the appointment This shows the **Appointment Confirmation** page as shown in Figure 4.5

Figure 4.5 Appointment Confirmation

7. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button. This will show the message as **“Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: “Date”, Appointment Start Time: “Time”, Appointment End Time : “Time”**”
8. Click on **Cancel Appointment** button. This will navigate back to **Reschedule Appointment** page.
9. Reselect the desired slot, this will again take to Appointment Confirmation page.
10. Select the various questions and click on **Confirm Appointment** button.
11. When the user hit on **Print** button, this will print the screen of the appointment scheduled.
12. Click on **Exit** button, this will make the user to logout of the application.

## Cancel Appointment

1. Select Manage Appointment from Appointment menu. This will show the Manage Appointment page as shown in [Figure 5.1](#)

Summit Health Sign Out

Appointment My Profile Feedback

Appointment >> Manage Appointment rajeshs

Client Name: Rajesh Inc.

Program Type: Immunization

Program Type	Program	State	City	Site	First Name	Last Name	Slot Type	Confirmed Appointment Time	WaitList Appointment Time
Immunization	Rajesh Inc. Immunization 03/19/2010 - 05/31/2010	Kentucky	Moorefield	Site for Rajesh Inc.	rajesh	sinha	Self	4/24/2010 9:00:00 AM CANCEL / RESCHEDULE	

\* To cancel your appointment, please click 'Cancel'  
 \* To reschedule your existing appointment, please click 'Reschedule'

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Figure 5.1 On selecting Manage Appointment

- Click on **Cancel** button. This will show the alert message as **“Do you want to cancel this appointment”** with **Ok** and **Cancel** button.
- Click on **Cancel** button to keep the appointment as scheduled.
- Click on **Ok** button.
- This will cancel the appointment with the message as **“The Appointment is Successfully Canceled and email sent to the user.”** As shown in Figure 5.2

Summit Health Sign Out

Appointment My Profile Feedback

Appointment >> Manage Appointment rajeshs

Client Name: Rajesh Inc.

Program Type: Immunization

The Appointment is Successfully Canceled and email sent to the user.

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Figure 5.2 Appointment Canceled

## Profile Update

- Click **My Profile** on menu
- This will open the Profile Update page with **Employee Details** and **Employee Password Details** as headers as shown in Figure 6.1

## Forgot Password

- Login
  - Click on **I am a Returning User** Radio button
  - Enter the User Name in the **User Name** textbox

## 2. Forgot Password

- Click on the **Forgot Password** link
- Screen as in [Figure 1.2](#) **Forgot Password** appears
- Click on **YES** button if you are registered with an **Email ID**
- Click on **NO** or **Don't Know** button if you are not registered with an Email ID. [Figure 1.4](#)
- When you hit on **YES** button, this will ask you to enter your **User Name** and **Email ID**.
- Screen as in [Figure 1.3](#) **Send Password** appears.
- Click **Send Password**.
- A message **Your Password has been sent to your Email ID**. is displayed to confirm that the password has been emailed to your email id
- Click on **Cancel** to go back to login page and login with user name and password

Figure 1.2 Forgot Password

Figure 1.3 Send Password when user hit **YES** button on Figure 1.2

Figure 1.4 Send Password when user hit **NO** or **Don't Know** button on Figure 1.2

- When you select the No or Don't Know option in the Forgot Password screen, you will get the option to enter the First Name, Last Name, User Name, Security Question and Answer.
- Click on **Create Password** button. This will create a password and an email will be sent to you.
- Click on **Back** button to go back to the login page.

## 7. Forgot User Name

- Click on **Forgot Username** link
- Screen as in [Figure 1.5](#) **Forgot Username** appears

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Forgot Username

Fields marked with \* are mandatory  
An email address is highly recommended, Without an email address you will not receive a reminder email

First Name \*

Last Name \*

Middle Initial

Email ID \*

Security question \*

Answer \*

"This system is restricted to only authorized users and Summit Health approved business"  
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Figure 1.5 Forgot User Name

- Fill in the details like First Name, Last Name, Middle Initial, Email ID, Security Question and Answer. Fill in all the mandatory fields marked with asterisk(\*)
- Click on **Send User Name** button. This will email the User Name to you.

Summit Health Sign Out

Appointment My Profile Feedback

Profile Update rajeshs

Fields marked with \* are mandatory

**Employee Details**

Client Name

User Name

First Name

Last Name

Date Of Birth

Email

Phone

**UPDATE EMPLOYEE INFORMATION**

**Employee Password Details**

Old Password

New Password

Confirm Password

**CHANGE PASSWORD**

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Figure 6.1 Profile Update

4. Edit the details like First Name, Last Name, Date of Birth, Email ID and Phone.
5. Click on **Update Employee Information** button.
6. This will give the message as **"Updated Successfully."** and will update your profile.
7. If you wish to change your password, in the **Employee Password Details**, fill in the values for **Old Password** then **New Password** and **Confirm Password**. Verify that the values are valid and matching or else the system will throw the alert message.
8. Click on **Change Password** button.
9. This will show the message as **"Updated Successfully"** and the Password of the user will get changed as shown in Figure 6.2

Summit Health Sign Out

Appointment My Profile Feedback

Profile Update rajeshs

Fields marked with \* are mandatory

**Employee Details**

Client Name

User Name

First Name

Last Name

Date Of Birth

Email

Phone

**UPDATE EMPLOYEE INFORMATION**

**Employee Password Details**

Old Password

New Password

Confirm Password

**Updated Successfully**

**CHANGE PASSWORD**

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Figure 6.2 Change Password

## Feedback

1. Click on **Feedback** tab on the header.
2. This will open the Feedback page as shown in [Figure 7.1](#)

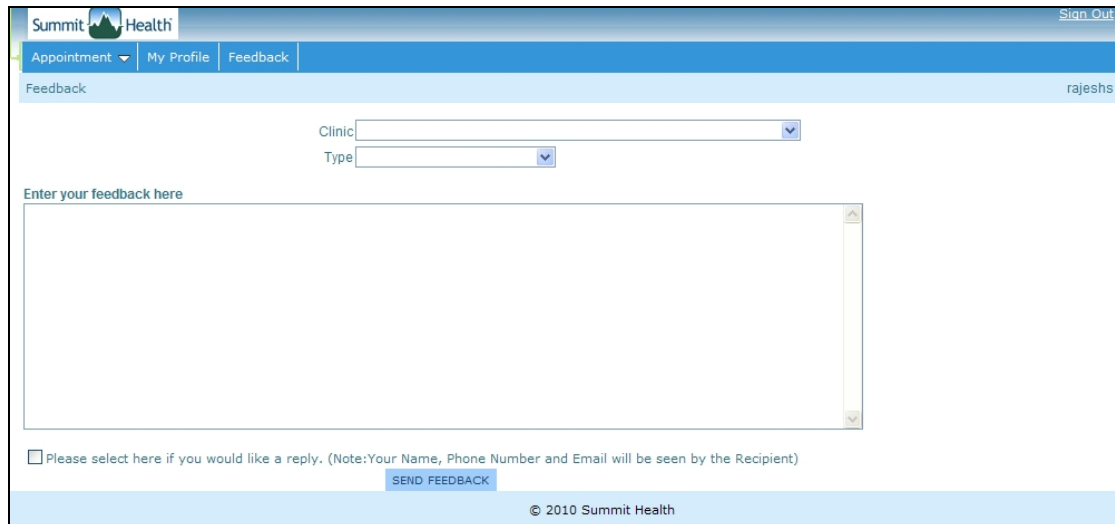


Figure 7.1 Feedback

3. Select the option for Clinic from **Clinic** dropdown menu.
4. Select either **Question** or **Feedback** from **Type** dropdown menu.
5. Fill in the comments in the “**Enter your feedback here**” section.
6. Check in the “**Please select here if you would like a reply**” if you want the reply to the feedback.
7. Click on **Send Feedback** button.
8. This will send the feedback of the clinic with the confirmation message as “**Your valuable feedback has been successfully sent.**” As shown in [Figure 7.2](#)



[Appointment](#) [My Profile](#) [Feedback](#)

Feedback

Clinic

E0010511, 3162 Ground Floor, Southfield, Michigan, 48034

Type

Question

Enter your feedback here

This is for User Manual, User Prospective

☐ Please select here if you would like a reply. (Note:Your Name, Phone Number and Email will be seen by the Recipient)

Your valuable feedback has been successfully Sent.

SEND FEEDBACK

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Figure 7.2 Feedback Sent